

**EPA ENERGY STAR PROGRAM EVALUATION  
IN-DEPTH INTERVIEW PROTOCOL  
DRAFT SURVEY INSTRUMENT**

**PROGRAM:** Residential Heating and Cooling

**SUBJECTS:** HVAC Purchasers

**ADMINISTRATION:** Small share sample to be administered by Opinion Dynamics personnel.

**Introduction:** Hello, this is \_\_\_\_\_ calling from Opinion Dynamics Corporation. We are conducting a survey of households for the U.S. Environmental Protection Agency. We would like to ask you just a few questions about your home's heating and cooling equipment. May I speak with the person in your household who has primary responsibility for taking care of your heating and cooling equipment. These questions will take just a few minutes. All information you provide will be confidential.

## **1. INTERVIEWEE IDENTIFICATION**

**Name:**

**Address:**

**Telephone/Fax:**

**e-mail address:**

## **2. PURCHASE DECISION-MAKING INFORMATION**

2.1 First, have you purchased any of the following kinds of heating and cooling equipment in the past two years? READ LIST AND CHECK ALL MENTIONED. IF NO EQUIPMENT PURCHASED IN PAST TWO YEARS, THANK AND TERMINATE.

2.2 FOR ALL EQUIPMENT TYPE MENTIONED. Can you recall when you purchased the [TYPE OF EQUIPMENT]? ENTER MONTH/YEAR IN GRID BELOW.

<b>Equipment Type</b>	<b>2.1</b>	<b>2.2</b>
a. Gas/oil furnaces		
b. Gas/oil boilers		
c. Central Air conditioners		
d. Programmable Thermostats		
e. Air source heat pumps		
f. Geothermal heat pumps		
g. Gas-fired heat pumps		

- 2.3 Why did you decide to get a new [type(s) of equipment]?
- Replaced failed equipment..... 1
  - Replaced operable equipment.....2
  - Part of remodeling .....3
  - Part of new construction .....4
  - Other \_\_\_\_\_.....5
- 2.4 Who did you purchase your equipment from—a contractor, retail store, or other?
- Contractor .....1
  - Retail store .....2
  - Other \_\_\_\_\_.....3
- 2.4.a How did you pay for your HVAC equipment?
- Cash ..... \_\_\_\_\_
  - Credit card..... \_\_\_\_\_
  - Home equity loan..... \_\_\_\_\_
  - Manufacturer loan..... \_\_\_\_\_
  - ENERGY STAR loan (please specify which one)..... \_\_\_\_\_
  - Other (please specify)..... \_\_\_\_\_
- 2.4b Were any of the following financing options available to you?
- ENERGY STAR financing ..... \_\_\_\_\_
  - Preferred term financing for high efficiency equipment ..... \_\_\_\_\_
  - Other financing or rebates ..... \_\_\_\_\_
- 2.4c [IF POSITIVE RESPONSE FOR 2.4b, THEN ASK:] Why did you choose [or choose not to finance your purchase of heating and cooling equipment?
- 2.5 Did you gather information about the kinds of equipment you purchased prior to contacting equipment dealers or contractors,?
- Yes ..... \_\_\_\_\_
  - No ..... \_\_\_\_\_
  - Don't know ..... \_\_\_\_\_

IF 2.5 = YES, ASK 2.5a. ELSE SKIP TO 2.5b

2.5a What sources did you consult for that information? CHECK ALL THAT APPLY.

Dealers and Contractors..... \_\_\_\_  
 Utilities..... \_\_\_\_  
 Government agencies..... \_\_\_\_  
 Advertisements..... \_\_\_\_  
*Consumer Reports* or other consumer-oriented magazines..... \_\_\_\_  
 How-to books..... \_\_\_\_  
 Friends and relatives..... \_\_\_\_  
 The Internet..... \_\_\_\_  
 Other \_\_\_\_\_ .....

2.5b Generally, what sources of information do you find to be reliable for such information?

Dealers and Contractors..... \_\_\_\_  
 Utilities..... \_\_\_\_  
 Government agencies..... \_\_\_\_  
 Advertisements..... \_\_\_\_  
 Consumer publications..... \_\_\_\_  
 How-to books..... \_\_\_\_  
 Friends and relatives..... \_\_\_\_  
 Other \_\_\_\_\_ .....

2.6 Did the dealer or contractor from whom you purchased the equipment offer you a choice of models for the heating or cooling equipment you purchased?

Yes..... \_\_\_\_  
 No..... \_\_\_\_  
 Don't know .....

IF 2.6 = YES, ASK 2.7, ELSE SKIP TO 2.10.

2.7 Did your dealer or contractor offer a high efficiency or energy efficient model?

Yes..... \_\_\_\_  
 No..... \_\_\_\_  
 Don't know .....

IF 2.7 = YES, ASK 2.7a, ELSE SKIP TO 2.10.

- 2.7a Who initiated discussions about energy-efficiency options?
- You .....1  
 Your HVAC Contractor .....2  
 Your General Contractor .....3  
 Other (Specify) .....4  
 Don't know/Not sure .....5
- 2.8 Did your dealer or contractor provide an estimate of the utility cost savings associated with the high efficiency or energy efficient model?
- Yes .....  
 No .....  
 Don't know .....
- 2.9 Did your dealer or contractor provide you with a financial analysis such as Return-on-Investment or payback to illustrate the economic effects of purchasing a high efficiency model?
- Yes .....  
 No .....  
 Don't know .....
- 2.10 Other than price, did you dealer or contractor mention any other features to consider in selecting equipment models or types?
- Yes .....  
 No .....  
 Don't know .....
- IF 2.10 = YES, ASK 2.11, ELSE SKIP TO 2.12.
- 2.11 What were those features?
- Energy efficiency .....  
 Utility costs to operate .....  
 Heating/Cooling capacity .....  
 Time to heat or cool space .....  
 Noise .....  
 Air quality.....  
 Reliability.....  
 Reputation of manufacturer/brand .....  
 Manufacturer's warrantee .....  
 Other .....  
 Other .....

- 2.12 On a scale of 1 to 5, where 1 is not at all important and 5 is very important, how important was each of the following in your selection of the heating and cooling equipment you purchased?

Price ..... \_\_\_\_\_  
 Brand..... \_\_\_\_\_  
 Energy efficiency/utility costs..... \_\_\_\_\_  
 Warranty..... \_\_\_\_\_  
 Recommendations from the contractor or dealer ..... \_\_\_\_\_  
 Recommendations from others (friends, family, etc.) ..... \_\_\_\_\_  
 Information from publications ..... \_\_\_\_\_

- 2.13 Were there any other factors you considered in selecting your equipment? IF YES: What were they?

\_\_\_\_\_  
 \_\_\_\_\_

- 2.16 If your new heating (or cooling) system uses ducts to provide heated (cooled) air, did the person who installed your system recommend any improvements to your duct system?

Yes ..... \_\_\_\_\_  
 No ..... \_\_\_\_\_  
 Don't know ..... \_\_\_\_\_

IF 2.16 = YES, ASK 2.17, ELSE SKIP TO 2.18.

- 2.17 Did you purchase these improvements?

Yes ..... \_\_\_\_\_  
 No ..... \_\_\_\_\_  
 Don't know ..... \_\_\_\_\_

- 2.18 Did the person who installed your new system recommend installing a new automatic setback thermostat that allows you to set different temperatures for different days?

Yes ..... \_\_\_\_\_  
 No ..... \_\_\_\_\_  
 Don't know ..... \_\_\_\_\_

IF 2.18 = YES, ASK 2.19, ELSE SKIP TO 2.20.

- 2.19 Did you purchase these improvements?

Yes ..... \_\_\_\_\_  
 No ..... \_\_\_\_\_  
 Don't know ..... \_\_\_\_\_

- 2.20 Compared with standard efficiency equipment, how much do you think the most efficient equipment can reduce the energy you use for heating and cooling?

0% to 5% ..... \_\_\_\_\_  
 6%-10% ..... \_\_\_\_\_  
 11%-15% ..... \_\_\_\_\_  
 16%-25% ..... \_\_\_\_\_  
 26%-35% ..... \_\_\_\_\_  
 36%-50% ..... \_\_\_\_\_  
 more than 50% ..... \_\_\_\_\_

- 2.21 What effects do you think using more efficient heating and cooling equipment can have on the environment? [RECORD UNPROMPTED ANSWERS. THEN PROBE FOR GREENHOUSE GASES/GLOBAL WARMING, AIR POLLUTION, ENVIRONMENTAL DAMAGE FROM PRODUCING FUELS, REDUCTION OF NOISE, REFRIGERANT DISCHARGE.]

UNPROMPTED RESPONSES:

PROMPTED RESPONSES:

### 3. ENERGY STAR RECOGNITION

- 3.1 Did your dealer or contractor mention the ENERGY STAR label or ENERGY-STAR qualifying equipment in the course of discussing equipment options?

Yes ..... \_\_\_\_\_  
 No ..... \_\_\_\_\_  
 Don't know ..... \_\_\_\_\_

- 3.2 Are you familiar with the ENERGY STAR label?

Yes ..... \_\_\_\_\_  
 No ..... \_\_\_\_\_  
 Don't know ..... \_\_\_\_\_

IF 3.2 = YES, ASK 3.13, ELSE END.

- 3.3 Could you describe it for me? [CIRCLE ALL ELEMENTS MENTIONED]
- Green color.....1
  - Blue color.....2
  - Yellow color.....3
  - Oblong shape.....4
  - Semi-circle.....5
  - Has a star.....6
  - Has the word Energy .....7
  - Has world map.....8
  - Includes DOE and/or EPA .....9
  - Other (specify).....10
- 3.4 Does the equipment you purchased, its packaging, or manuals have the ENERGY STAR label on it?
- Yes.....
  - No.....
  - Don't know .....
- 3.5 Could you tell me what the ENERGY STAR label means in regard to home heating and cooling products? [CIRCLE ALL ELEMENTS MENTIONED]
- The product meets certain efficiency specifications.....
  - The specifications were worked out with industry.....
  - The product saves energy .....
  - The product is reliable .....
  - The product is more expensive than standard models .....
  - The product helps the environment .....
  - Other .....

3.6 More generally, what messages does the ENERGY STAR label convey to you?

Using an Energy Star-labeled product saves energy.	1
Using an Energy Star-labeled product reduces air pollution or helps the environment.	2
Using an Energy Star-labeled product saves me money.	3
Energy Star-labeled products are of high quality.	5
Energy Star is a label created by the federal government.	6
Manufacturers that make Energy Star-labeled products are good corporate citizens.	7
Other (Specify)	9
Don't know	10

THANK YOU FOR YOUR TIME AND COOPERATION.